



## CLIENT FREQUENTLY ASKED QUESTIONS

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### UPGRADE

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**Q: What is Universal Benefit Account?**

A: Universal Benefit Account® is the smart, easy and connected way to manage benefits. Choose from more than 30 integrated accounts to build the benefit offering that best meets the needs of your employees and organization—with the ability to easily switch accounts at any time. One website, one mobile app and one card removes the complexity common with managing multiple benefit accounts. Information is entered once, no matter how many benefit accounts you choose, increasing accuracy and efficiency. Universal Benefit Account makes benefits feel like benefits®!

**Q: What does it mean to upgrade?**

A: It means you're being upgraded to a new and improved web, mobile and card experience! By upgrading to Universal Benefit Account, you will be able to manage all your TASC benefits in one place and add or change accounts as your business needs grow and change. To learn more, visit our [online Upgrade Resource site](#).

**Q: Do I have to upgrade now?**

A: Yes. All customers are being upgraded to the new experience. The current platform will no longer be accessible.

**Q: What happens if I do not upgrade?**

A: The current platform will no longer be accessible. When an attempt to sign in is made, the old experience will redirect to the new experience.

**Q: When will my account be upgraded to the new website?**

A: Dates will be communicated via email. Please make sure your email (and the contact information for all other account users) is up-to-date in your MyTASC account profile.

**Q: What should I expect in the new experience?**

A: You will be able to use Universal Benefit Account to manage multiple TASC accounts in one place. The web experience features a fresh new look with important account information upfront. Most frequently performed tasks are located on the homepage and intuitive to use, making managing your benefits quick and easy. In addition, your participants will experience an intuitive website and mobile app, making account management easier wherever they go. Participants will also receive a new TASC Card—one card that works across all TASC benefit accounts.

**Q: How will this upgrade impact the work I do as an administrator?**

A: You will still be able to do everything you do today—and much more! To make sure you are comfortable with how to sign in and use Universal Benefit Account, please visit our helpful [online Upgrade Resource site](#). Also, be on the lookout for additional information and instructions via email. To receive these communications, make sure all contact information is up to date in your existing MyTASC account ([www.tasconline.com](http://www.tasconline.com)).



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### **Q: How will this impact my employees?**

A: They too will be introduced to the new experience, which includes web, mobile and card. They will receive email communications and have access to the [online Upgrade Resource site](#). And—most exciting—they will experience many new features with Universal Benefit Account:

- TASC Card Lock
- Identify Theft Protection
- Picture to Pay (mobile version) and Pay the Provider (web version)
- Card Decline Protection

### **Q: Will I be able to access transaction information that occurred prior to Upgrade?**

A: To ensure financial confidence, we will not carry past transactions into Universal Benefit Account; however, you may obtain a list of your past transactions by submitting a support request (from your account, click Contact Us, select Topic: Expenditures, and select Sub-Topic: I'd like my reimbursement request history). [Watch this video for instructions](#).

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## SIGN IN

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### **Q: How do I sign in to my new account?**

A: Sign in at <http://www.tasconline.com>. Use your email address as your username. Before signing in for the first time, you must **sign up** for an account. To do so, click the green **sign up** link (under the Terms and Conditions), then enter your email and create a password.

### **Q: Can I use my MyTASC login credentials to sign in to Universal Benefit Account?**

A: No. MyTASC login credentials will not work in Universal Benefit Account. You must “sign up” for an account and then sign in with your email address and password.

### **Q: What internet browser should I use?**

A: Chrome is the recommended browser.

### **Q: If I am the client administrator and am enrolled as a participant in one of the benefit plans, how do I sign in?**

A: You may use the same email address for both your client sign in and your participant sign in.

- First, sign up as a client (click the white box on the right side of the Welcome page) to establish your new account.
- Then, to access your participant account (click the green box on the left side of the Welcome page), enter the same email and password you used for your client access.



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## ACCOUNT MANAGEMENT

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### Q: Where do I find information on how to perform administrator functions?

A: Please visit the [online Client Upgrade site](#) for helpful materials on how to manage employee status, run a report, or upload a file. The site contains a variety of ways to learn how to navigate and perform administrative functions with Universal Benefit Account.

- Attend an upcoming webinar series
- Watch a prerecorded webinar
- Review the Client Education Guide
- Read the Client Administration Manual

### Q: Where do I find information on the common administrative functions?

A: Here are some shortcuts to information covered in the Administration Manual:

- **How do I verify or make edits for my next payroll amount?**
  - View [Verify Contributions](#) video.
- **How do I change an employee election?**
  - If the benefit plan is active, submit a support request with the following information:
    - Employee name and TASC ID
    - Effective date of change and reason for change
      - Medical and Dependent Care is on an annual election
      - Parking and Transit is on a monthly election
- **How do I add an employee?**
  - View [Adding an Employee](#) video.
- **How do I terminate an Employee?**
  - View [Terminating an Employee](#) video.
- **Where are my reports?**
  - From your online account, go to the Reporting tab; the following reports are currently available:
    - **Enrollment Report** – lists current participants enrolled by plan and election
      - Plan name
      - Plan description
      - Plan ID
      - Benefit plan years
      - Individual IDs
      - Demographic information
      - Enrollment dates
      - Eligibility start dates
      - Individual election amounts
      - Employer election amounts
    - **Funding Report** – ties to a funding event and shows detail of ACH (PVR/POD events)
    - **Request Payment Detail** – list claims paid for each employee (does not show service provider)



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- **Reconciliation Report** – (formerly known as the Finalization Report or Balance/Exposure Report)
  - Lists a participant's benefit plans, elections, current funding amounts, carryover and totals paid to date
- **Where can I see current balances for an individual employee?**
  - From your online account, go to the Employee Tab, select the employee whose balance details you want to view, and click on their Employee Accounts Summary.

**Q: Do I need to provide an enrollment file if I already provided an employee census file?**

A: Yes, you need to add your census file before the enrollment. Adding your census file simplifies future enrollment and communications, provides effortless COBRA enrollment, and makes adding other benefit accounts seamless. Plus, Universal Benefit Account offers accounts that do not require an employer sponsor, such as Health Savings Accounts and GiveBack Workplace Giving; therefore, having census information allows participants to continue their non-employer sponsored benefit accounts indefinitely.

**Q: Why am I finding a \$.01 ACH from my bank account? Our bank is requesting an authorization for a new code: why am I being notified of a change to a filter code?**

A: As part of your financial security, you may have set up a debit filter on your company's bank accounts. This 10-digit filter code, known as an ACH Originator ID, tells the bank who is authorized to debit funds from the specified account.

Universal Benefit Account uses a different bank account than what was used in the past. You will need to add (not replace) the old account with the new. The reason you see the \$.01 deduction is because it is necessary for us to establish a connection between Universal Benefit Account and the Bank. This is customary when setting a new filter code.

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### TASC CARD

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**Q: When will plan participants receive their new TASC Card?**

A: TASC Cards will be automatically issued to participants and dependents. Participants should watch for their card to arrive in a plain white envelope to the address listed in their account profile.

**Q: Do participants need to activate their new TASC Card?**

A: No, the TASC Card comes activated and ready to use. Participants can use it to pay for eligible expenses as soon as their plan is live on Universal Benefit Account. They should watch for a welcome email with more information.

**Q: Can participants get a TASC Card for their spouse and/or dependents?**

A: TASC Cards for dependents will automatically be sent if they had one before. They can also request a TASC Card for their spouse and/or dependents from their account via the website or mobile app if they didn't previously have one.



## CLIENT FREQUENTLY ASKED QUESTIONS

**Q: What if a participant misplaces their card?**

A: They can put a temporary lock on their TASC Card. When they find their card, they can unlock it with the click of a button—all from the website or mobile app.

**Q: What if a card is lost or stolen?**

A: Participants must sign in to their account to report it lost/stolen. The card will be immediately deactivated and a new card issued.

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### FEEDBACK

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**Q: Where can I submit feedback regarding my experience with TASC and the upgrade to the new website?**

A: To provide feedback, click the green megaphone icon in the lower right corner of your account. We'd love to hear from you!